

CR CONSUMER REPORTS
Survey Research Report

Plant-Based Milk Survey
2018 Nationally Representative Phone Survey
October 31, 2018

INTRODUCTION

In October 2018, Consumer Reports conducted a nationally representative phone survey. The purpose of this survey was to assess Americans' understanding, perception, purchasing behavior, and consumption of plant-based milk. SSRS administered the survey to a nationally representative sample of 1,003 adult U.S. residents through its Omnibus Survey. Respondents were selected by means of random-digit dialing and were interviewed via landline or cell phone. The data were statistically weighted so that respondents in the survey are demographically and geographically representative of the U.S. population.

HIGHLIGHTS

Plant-Based Milk Awareness

- More than eight out of 10 Americans (84%) say they have heard of or seen plant-based milks, such as almond, soy, or coconut milk.

Are Plant-Based Milks Nutritionally Equivalent to Cow's Milk?

- 27% of Americans say plant-based milks have more protein, calcium, vitamin A and potassium than cow's milk.
- 25% of Americans say plant-based milks have the same amount of protein, calcium, vitamin A and potassium than cow's milk.
- 26% of Americans say plant-based milks have less protein, calcium, vitamin A and potassium than cow's milk.
- 20% of Americans don't know.

Plant-Based Milk Consumption

- More than a third (35%) of Americans say in the past year they have purposely drank or cooked with plant-based milk as a substitute for cow's milk.

Purchasing Behavior

- 68% of Americans say they usually or always purchase cow's milk.
- 18% of Americans say they purchase both cow's milk and plant-based milk equally.
- 10% of Americans say they usually or always purchase plant-based milk.

Reading the Ingredients on Plant-Based Milk Packaging

- More than half (53%) of Americans who purchase plant-based milk say they did not read the ingredients the last time they purchased one that they hadn't purchased before.
 - More than a quarter (28%) say they did read the ingredients and it affected their purchasing decision.
 - Nearly 2 in 10 read the ingredients but it did not affect their decision.

Reasons for Purchasing Plant-Based Milk

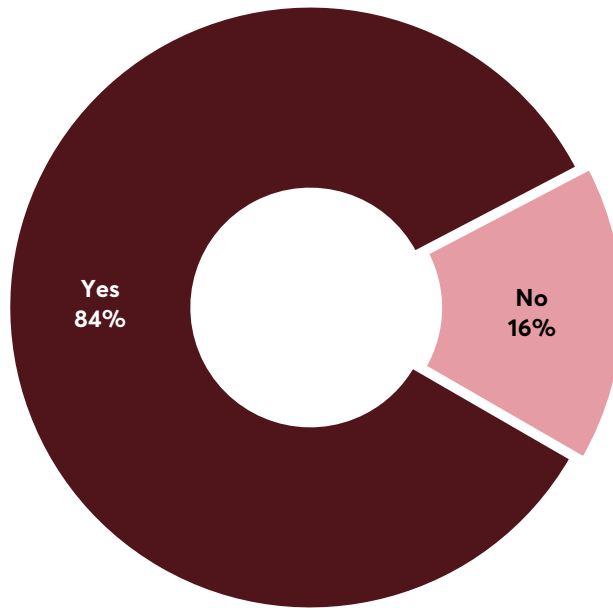
- More than half of Americans who purchase plant-based milk say they do so because it's healthier than cow's milk (58%), tastes better than cow's milk (54%), better for the environment (53%), and/or reduces exposure to antibiotics and hormones (53%).

FINDINGS

Plant-Based Milk Awareness

More than eight out of 10 Americans (84%) say they have heard of or seen plant-based milks, such as almond, soy, or coconut milk. Females are more likely than males to say they have heard of or seen plant-based milks.

Have You Heard of or Seen Plant-Based Milks?



Base: All respondents

Plant-Based Milk vs. Cow's Milk

Some manufacturers of plant-based products use the term "milk" on the label of plant-based beverage products. The FDA restricts the use of the term "milk" on food labels to "the lacteal secretion obtained by the complete milking of one or more healthy cows," but has not enforced this rule. The dairy industry wants to prevent nondairy beverages from being marketed as "milk" in part because they feel it is misleading to the American consumer. The FDA has raised concerns that the labeling of some plant-based products may lead consumers to believe that those products have the same key nutritional attributes (i.e., protein, calcium, vitamin A, and potassium) as dairy products. Compared to dairy milk, plant-based beverages can vary greatly in nutritional content. We wanted to gauge the American consumers' understanding of this topic.

We asked Americans **"Compared to cow's milk, do you think unsweetened plant-based milks have MORE, the SAME, or LESS nutrients (i.e., protein, calcium, vitamin A, and potassium) than cow's milk?"**

We found that Americans are completely divided on their views if plant-based milk has more, the same, or less protein, calcium, vitamin A, and potassium than cow's milk.

Compared to cow's milk...

27% of Americans say plant-based milks have **MORE of these nutrients.**

25% of Americans say plant-based milks have **the SAME amount of these nutrients.**

26% of Americans say plant-based milks have **LESS of these nutrients.**

20% of Americans say they just don't know.

Americans who consume plant-based milks are more likely than those who don't to say that plant-based milks have more of these nutrients compared to cow's milk. However, with so many plant-based milk products on the market it is hard to draw conclusions regarding this finding since we do not know on which specific plant-based milk responses were based.

¹ The response scale and presentation order of "more" and "less" in the question stem were randomized.

Plant-Based Milk Labels

We were interested in how labeling might impact Americans' perception or expectation regarding the nutritional properties of plant-based milk products.

First, we read the following **examples of claims** that appear on plant-based milk products to respondents:

"Plant-Powered Protein"
"Heart-Healthy Protein"

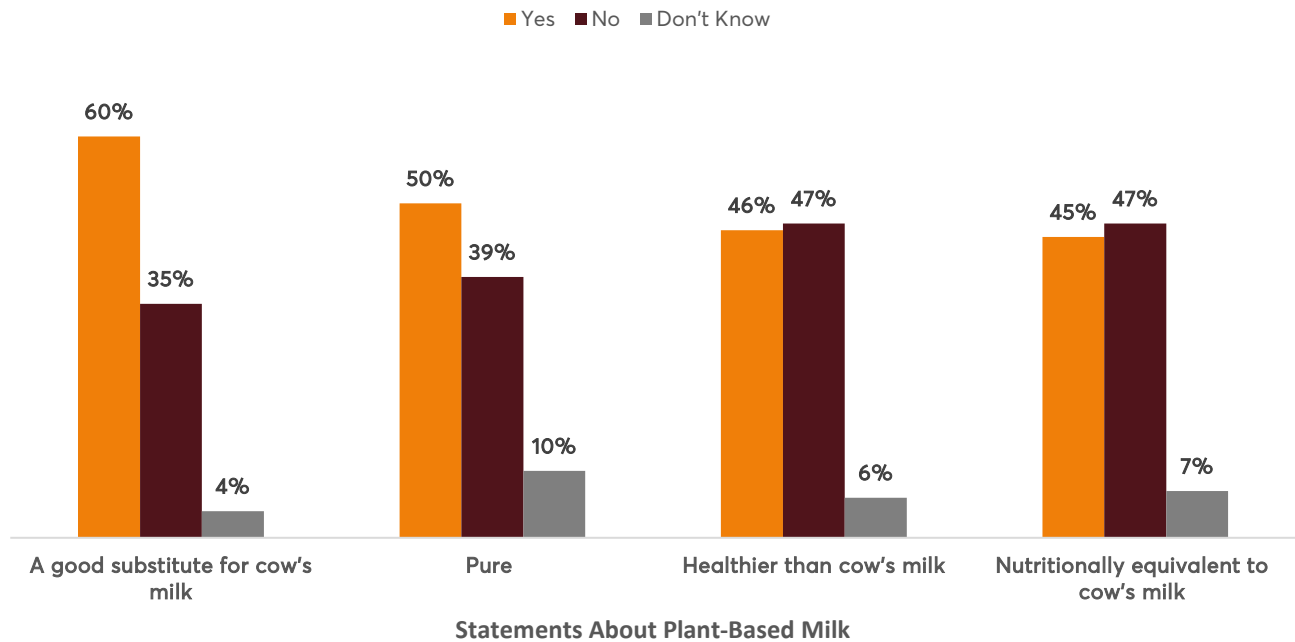
"Cholesterol-Free & Heart Healthy Protein"
"Original Nutritious Pea Milk"

Then we asked them, **"After reading these, do these claims suggest to you that plant-based milk is...?"**

- a good substitute for cow's milk**
- healthier than cow's milk**
- nutritionally equivalent to cow's milk (i.e., nutrient content is the same)**
- pure (i.e., does not have ingredients other than the plant from which is was derived)**

Six in 10 Americans say that the claims suggest that plant-based milks are a good substitute for cow's milk and half of Americans say that it suggests that plant-based milks are pure and, therefore, only contain the specific plant-based ingredient.

Do the Claims Suggest that Plant-Based Milk is....?

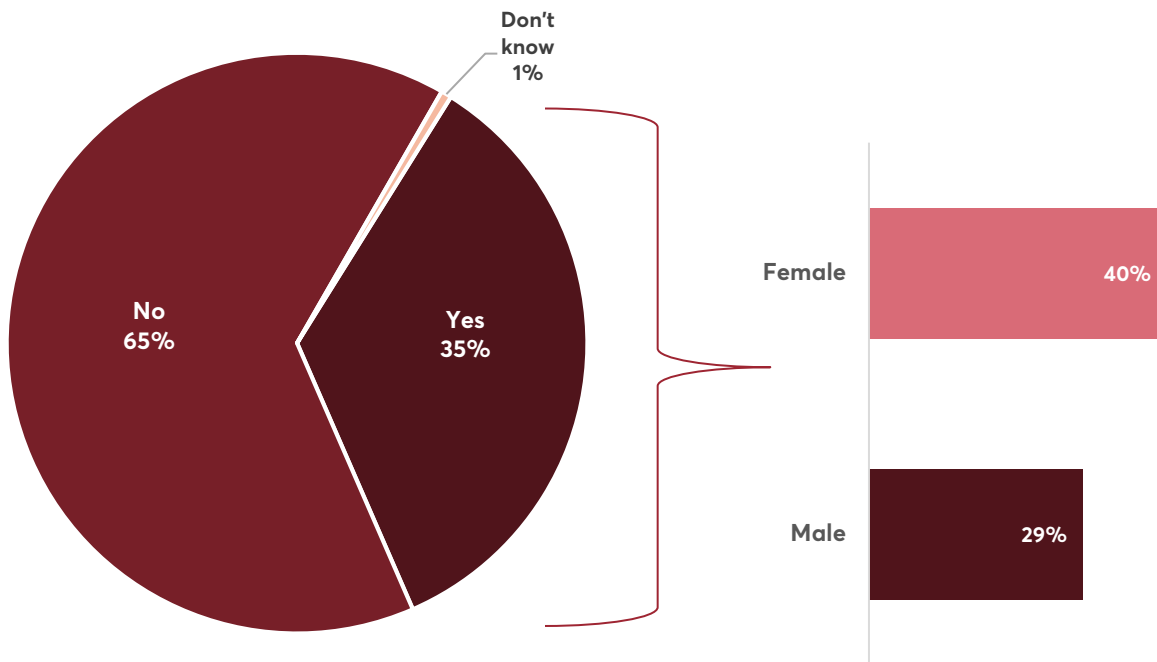


Base: All respondents

Plant-Based Milk Consumption

More than a third (35%) of Americans say in the past year they have purposely drank or cooked with plant-based milk as a substitute for cow's milk. Females (40%) are significantly more likely than males (29%) to have done so.

Consumed Plant-Based Milk in the Past Year



Base: All respondents

Base: Americans who consumed plant-based milk in the past year

Purchasing Behavior

We then asked Americans about their typical milk purchasing behavior.

68% of Americans say they usually or always purchase cow's milk.

18% of Americans say they purchase cow's milk and plant-based milk equally.

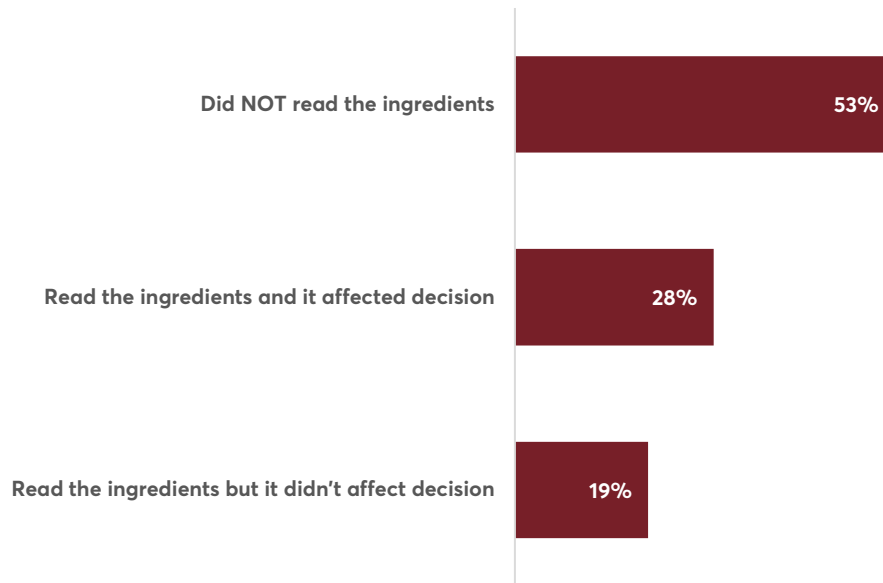
10% of Americans say they usually or always purchase plant-based milk.

Reading the Ingredients on Plant-Based Milk Packaging

In an attempt to gauge if American consumers know what ingredients are in the plant-based milk products they are purchasing and how this impacts their behavior, we asked Americans ***“The last time you purchased a plant-based milk that you hadn’t purchased before, did you read the ingredients when deciding which one to purchase?”***

More than half (53%) of Americans who purchase plant-based milk say they did not read the ingredients the last time they purchased one that they hadn’t purchased before. More than a quarter (28%) say they did read the ingredients and it affected their purchasing decision.

Consumer Behavior and its Impact on Purchasing Decision



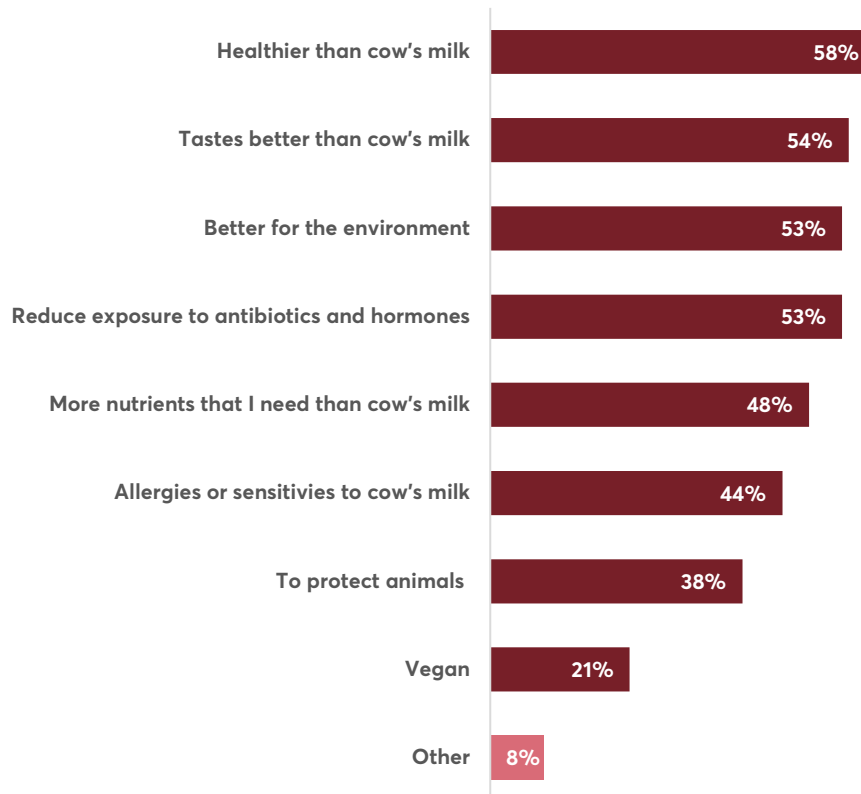
Base: Americans who say they purchase plant-based milk (either exclusively or in addition to cow's milk)

Reasons for Purchasing Plant-Based Milk

More than half of Americans who purchase plant-based milk say they do so because it's healthier than cow's milk (58%), tastes better than cow's milk (54%), better for the environment (53%), and/or reduces exposure to antibiotics and hormones (53%).

Nearly half (48%) of Americans who purchase plant-based milk say the reason for purchasing it is that plant-based milks have more of the nutrients that they need compared to cow's milk.

Reasons for Purchasing Plant-Based Milk



Base: Americans who say they purchase plant-based milk (either exclusively or in addition to cow's milk)

SUMMARY

With the popularity and prevalence of plant-based milk products on the rise, we surveyed over 1,000 Americans to assess their understanding, perception, purchasing behavior and consumption of plant-based milk.

Most Americans say they have heard of or seen plant-based milks and more than a third of Americans say they have drunk or cooked with plant-based milk as a substitute for cow's milk in the past year. More than half of Americans who drink plant-based milk say they do so because it is healthier than cow's milk, tastes better than cow's milk, better for the environment, and/or reduces exposure to antibiotics and hormones.

Americans are divided on their views about whether plant-based milks are nutritionally equivalent (in terms of protein, calcium, vitamin A, and potassium) to cow's milk. However, those who consume plant-based milks are more likely to say that plant-based milks have more of these nutrients compared to cow's milk. However, with so many plant-based milk products on the market it is hard to draw conclusions regarding this finding since we do not know on which specific plant-based milk responses were based.

METHODOLOGY

This phone survey was fielded by SSRS using a nationally representative sample. The SSRS Omnibus is a national, weekly, dual-frame bilingual telephone survey. Interviews were conducted from October 16-21, 2018 among a sample of 1,003 respondents in English (962) and Spanish (41). Of the 1,003 interviews, 401 were from the landline sample and 602 from the cell phone sample. The margin of error for the sample of 1,003 is +/-3.63% at the 95% confidence interval. Smaller subgroups will have larger error margins.

The SSRS Omnibus uses a fully-replicated, stratified, single-stage, random-digit dialing (RDD) sample of landline telephone households, and randomly generated cell phone numbers. Interviewing is conducted over a six-day period using a computer-assisted telephone interviewing (CATI) system.

All SSRS Omnibus data are weighted to represent the target population. Final data are weighted by age, gender, region, race, education, and phone usage type to be proportionally representative of the U.S. adult population.

Key demographic characteristics (after weighting was applied) of this sample are presented below:

- 51% female
- Average age of 48 years old
- 33% 4-year college graduates
- 47% have a household income of \$50,000 or more